



Smartly

Powering your people

myob
Buisness

Onboarding guide

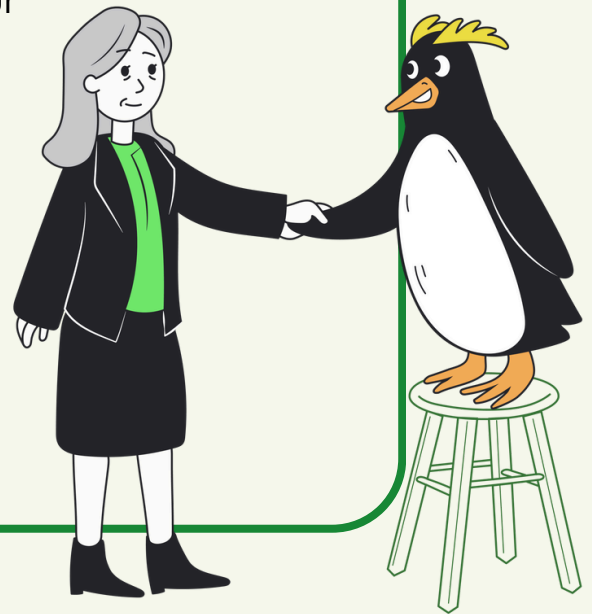
Switching to Smartly

Did you know Smartly can manage your implementation for you?

With Smartly's Managed Implementation service, we format and input all of your relevant payroll information and employee data on your behalf.

- Your dedicated Relationship Manager runs your onboarding process, with priority support throughout.
- We help you export your payroll data from Xero.
- We format your data and directly upload your payroll information into Smartly.
- We configure your site settings for you, including any relevant integrations i.e. Xero.
- Unlimited training sessions.

Reach out to your Relationship Manager to find out more!



Employee Details

You can copy and paste your employee details directly from your MYOB Business payroll site into Smartly. To find your employee details go to Payroll > Employees. Once an employee is selected navigate between the tabs to transfer all information across.

Personal

Employment

Standard pay

Leave

Pay history

Personal

First name *

Surname or family name *

Date of birth

Calculated age

Gender

Employee ID

Contact

Country

New Zealand

Address

City/town

Region

Postcode

Phone

+ Add another phone number

Email

If your employee has any allowances or deductions set up you can find these in the Standard Pay tab under Earnings and Deductions. Please provide these to your Relationship Manager for loading.

Historic Leave Earnings

To maintain compliance with the Holidays Act, we need 53 weeks of earnings data for each employee to enable Smartly to accurately calculate leave payments, we will require you to complete our Historic Earnings template which was sent to you by Smartly.

You can use the “Pay Run Summary” report found in Reporting > Reports > Pay Run Summary.

This report provides you with gross earnings, hours paid and days paid to be entered into the historic earnings template provided.

The most recent pay period will display first. You will need to expand all details to get a full breakdown of the pay and from there you will be able to copy the details into your Smartly template.

Note: You can only view one pay period at a time, and you can navigate between pay periods by selecting the drop-down box and selecting the relevant pay period.

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Pay run summary report

Save as

Pay run

30 Dec 2024 - 05 Jan 2025

Employees All selected

Report options Reset

30 Dec 2024 - 05 Jan 2025

23 Dec 2024 - 29 Dec 2024

16 Dec 2024 - 22 Dec 2024

09 Dec 2024 - 15 Dec 2024

02 Dec 2024 - 08 Dec 2024

25 Nov 2024 - 01 Dec 2024

18 Nov 2024 - 24 Nov 2024

11 Nov 2024 - 17 Nov 2024

Refresh Expand all Collapse all

Customise Export View and print

Gross pay (\$)	Take home pay (\$)	Days paid	
1,876.28	1,410.59	5	▼
1,276.99	1,060.99	4	▼
1,621.10	1,157.60	5	▼
1,766.24	1,243.82	5	▼

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Pay run summary report

Save as

Pay run

30 Dec 2024 - 05 Jan 2025

Employees

All selected

Report options

Reset

30 December 2024 to 5
January 2025



Refresh



Expand all



Collapse all

Customise

Export

View and print

Employee name

Gross pay (\$)

Take home pay
(\$)

Days paid

1,876.28

1,410.59

5

Pay

Quantity

Rate (\$)

Total (\$)

Ordinary Hours

0.00 hours

28.00

0.00

Annual Holidays (30/12-31/12)

0.40 weeks (22.00

702.51

Annual Holidays (03/01)

0.20 weeks (11.00

351.26

Public Holidays (01/01-02/01)

2.00 days

702.51

Overtime

0.00 hours

42.00

0.00

Head-\$5

0.00

5.00

0.00

Management Allowance

120.00

Important:

FBAPS leave is only recorded in days. For the historic earnings we need to have both the hours paid and days paid figures recorded. You will need to identify when a leave day has been taken, convert the day into hours and add this to the ordinary hours already recorded in that employees pay.

Note: the total days paid will already be recorded in the top right-hand corner of the pay breakdown.

Employee name

Gross pay (\$)

Take home pay
(\$)

Days paid

1,899.89

1,405.27

5

Pay

Quantity

Rate (\$)

Total (\$)

Ordinary Hours

0.00 hours

28.00

0.00

Annual Holidays (26/04)

0.20 weeks
(11.00
hours)

355.98

Public Holidays (25/04)

1.00 day

355.98

Sick Leave (22/04-24/04)

3.00 days

1,067.93

Annual leave is displayed in hours and days. You will just need to add the annual leave hours to the ordinary hours to come to the total number of hours paid to your employee.

Please reach out to your Relationship Manager if you have any questions on completing the Historic Earnings template.

Here is an **example** of the template provided by your Customer Relationship Manager. Please input each **employee's pay details** from the reports extracted from Xero.

Note: in the first tab on the spreadsheet there are some examples of how to complete it.

Employee Name	PPE Date	Gross Earnings	Ordinary Pay	Total Hours Paid	Days Paid
ayroll	12/05/2024	2000	2000	80	
ayroll	28/04/2024	2000	2000	80	
ayroll	14/04/2024	1250	1250	50	
ayroll	31/03/2024	1500	1500	60	
ayroll	17/03/2024	2000	2000	80	
Employee Name	PPE Date	Gross Taxable Earnings	Ordinary Pay	Total Hours Paid	Days Paid
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					
Employee 1					

Leave Reports

After processing your last pay in MYOB, please send us the following two leave reports so we can load your employees' opening leave balances into Smartly.

- Leave Balances Report
- Leave Liability Report

When running each report, select the last pay period end date before transitioning to Smartly, and provide this report to us in Excel format.

Leave Balances

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Leave balance report

Save as

Employees

All selected

Reset

Estimated as at 8 January 2025

Refresh

Export

View and print

Employee name	Current annual holidays balance (weeks)	Estimated annual holidays in advance (weeks)	Estimated annual holidays available (weeks)	Sick leave (days)	Alternative holidays (days)
	-0.56	0.83	0.27	8.50	0.00
	-2.97	3.85	0.88	5.00	0.00
	0.00	0.00	0.00	20.00	0.00
	0.00	0.00	0.00	9.00	0.00
	2.90	0.00	0.00	5.00	0.00
	0.60	0.45	1.05	4.75	0.00
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Leave Liability

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Leave liability report

Save as

Date

08/01/2025

Employees

All selected

Reset

Estimated 8 January 2025

Refresh

Export

View and print

Employee name	Annual holidays due (weeks)	Annual holidays rate (\$)	Annual holidays (\$)	Holiday pay due (\$)	Alt holidays due (days)	Alt holidays due (\$)	Total liability (\$)
	-0.56	0.00	0.00	511.04	0.00	0.00	511.04
	-2.97	0.00	0.00	1,229.63	0.00	0.00	1,229.63
	0.00	0.00	0.00	5,084.74	0.00	0.00	5,084.74
	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	2.90	1,578.50	4,577.66	5,252.15	0.00	0.00	9,829.80
	0.60	1,646.88	988.13	878.48	0.00	0.00	1,866.61
	-1.10	0.00	0.00	-1,519.87	0.00	0.00	-1,519.87